

League Volunteer Council
Strategic Conversation #1
Strategic Planning
October 20, 2021

Present

Facilitators: Julie Meredith, Volunteer Council President, 2021-2022
Janet Cabot, Volunteer Council President-elect, 2021-2022
Linda Stevens, Volunteer Council Sustainer Liaison, 2021-2022
Charlotte Lewis, Volunteer Council Secretary, 2021-2022
Samara Ungar, League of American Orchestras Constituent Liaison

Welcome and Call to Order at 3:03 p.m. CDT (Julie Meredith):

Julie introduced herself and the members of the council: Janet Cabot, president-elect; Charlotte Lewis, secretary; and Linda Stevens, Sustainer Liaison who will guide us through today's session. She also introduced Samara Ungar, League of American Orchestras Constituent Liaison

She welcomed 12 participants to the first conversation and asked them to introduce themselves and say a couple of words about their organization.

Facilitator #1: Strategic Conversations is a way to help the presidents and presidents-elect of volunteer organizations. These conversations are free flowing and guided by you. Thank you for responding to our survey. We were able to pick topics accordingly. The conversation today will be facilitated by Linda Stevens.

Facilitator #2: I am in one of the organizations in Kansas City. I have been to seven conferences. The timing of this conversation is perfect because I am ready to do strategic planning with my organization. I did this when I was in Seattle. I worked with Microsoft in Seattle and did this professionally every year. Motivations are different for volunteer organizations, but it is really to plan what you want to do in the future.

We have a poll that we'll do now on the experience in this group.

1. Does your volunteer organization have a strategic plan? 14% yes; 64% no; 21% not sure
2. Have you participated in creating/updating a strategic plan? 36% yes; 64% no
3. Do you know how to lead a strategic plan? 0% yes; 64% no; 36% somewhat

It can be very complicated, but I look at keeping it simple.

- First survey members for strengths and weaknesses either by surveys or small group meetings to see what works and what doesn't. Use your own instincts about your organization and concentrate on what is not working (weaknesses).
- Do a SWOT analysis - you can find information online - of strengths, weaknesses, opportunities and threats. Opportunities are different ways of doing things that may not be working. Think differently about what's working or not working. Threats which are other volunteer organizations, i.e., competition for the same resources whether it's people and/or money.
- Structure your survey along SWOT lines - what do you like best about our organization (strengths), what's not working for you (meeting times, can you support fundraising), are there other opportunities out there (not necessarily fundraising, what can the volunteers be doing).

Facilitator #3: Ask your orchestra for their strategic plan so you see what they are trying to accomplish. What are their goals? Our organization has done strategic planning at the same time as the orchestra has done it.

Participant #3: Please send us your PowerPoint presentation today.

I want to share one thing with you. We have a new executive director who is a woman, and our new symphony board president is also a woman. The symphony staff has had a changeover in the past few years so this has given us an opportunity for a brand-new start. We met to discuss more collaboration between the board, staff, and the volunteer organization. I wanted to share woman power, all coming together to support the organization.

We do a designer house every other year. We commit \$100,000 each year. It is easy to do with the designer house but more difficult on the off year. We did a virtual event and a golf tournament this year and still donated \$82,000.

Facilitator #2: COVID has been a problem, but we can look at it as a way to give us new ideas. It's caused us to rethink things rather than looking at it as a negative.

Participant #1: How large are the organizations?

We'll put that in a chat for all to answer.

Participant #2: Please briefly describe your designer house.

Participant #3: We have a search committee to find the house. It's getting the right fit. The owner must move out for three months and then back in - the owner pays for the move. We are open for four weeks usually in the fall. We have a bare bones party so people can see the house before it is decorated. The designers pay for the renovation of each room. There is a gala and corporate parties to bring in money. We're open seven days a week for four weeks. We have a house by January or February for a September function. I'll send you the info that I have.

Participant #4: What do you charge?

Participant #3: The charge is \$30 or \$40 a ticket, I think.

Facilitator #2: The next slide is about how to get started on strategic planning.

- Clarify the vision and mission. What is the fundamental purpose of your organization? Align the mission with the symphony mission. They shouldn't be the same, but they should be complementary. It concentrates on the present. It should hold for some time. The vision statement concentrates on what's possible in the future. What can we do that we're not doing now?
- Identify volunteer opportunities to achieve that mission. Get new volunteers engaged immediately otherwise they don't stay around. Put them on a committee immediately. Find out what they like to do and get them engaged. Volunteer opportunities need job descriptions: what does it involve, how many hours a month, what are the peak workloads, how much time must I spend, is it during the day or evening.
- What are the threats to your organization? We've mentioned what that means.
- Create SMART goals
 - Specific - well defined and clear to anyone who reads it. Shouldn't be more than a sentence long.
 - Measurable - How do you know when you've achieved it? This should be number based. It might be based on the amount of money raised, when you must complete it, or how many new members we've brought to the organization. That way you know when you've achieved or that you haven't achieved it. These should be reviewed every year.
 - Attainable - There should be agreement on this by the stakeholders in order to be attainable.
 - Realistic - Do you have the resources and knowledge to do it? It shouldn't be so far out there that it can't be achieved. Complete a volunteer profile - find

out what skills or background your volunteers have. You can find these tools online.

- Time based - Is there enough time to achieve it? Or do you have too much time? Have a reasonable timeframe. Some may be very short term.
- Identify the members to implement the goals. Three to five goals are reasonable to begin with. You might assign a particular person to lead a particular goal so you have a way to get people involved.

Facilitator #3: Divide strategic planning into smaller chunks so it's not overwhelming. Possibly membership or some other single goal. You need consensus in your organization to achieve a goal.

I know of one organization that turned a president's tea for leadership into a strategic planning session so there was purpose to the fun they had.

Participant #1: We attempted to work on strategic plan a couple of weeks ago. We didn't have full board representation. We had representation from the symphony. We made some progress. We reviewed our vision and mission. We had worksheets for people to work on. We wanted committee chairs to identify what they do each month, so we don't get spread too thin. It is a work in progress. Most people were engaged. It went better than I expected.

Participant #6: I think it went well. It was helpful to think about it and write down what we need to do. People often think about it, but it doesn't go farther than that, so writing it down really helped.

Facilitator #2: In our own minds we know what we should be doing but until we write it down and share it, it is hard to get it accomplished. Start with goals and compare them to the vision and mission so they mesh. Doesn't have to be chronological with these three things. You may start with goals and work your way up.

Facilitator #3: Sometimes we've done a strategic plan but didn't do the final step which is sharing it with our members. We need to think about how we share it with our members. We probably should update the strategic plan every three years (maybe four) - five years seems too long. Then review it each year to see if changes should be made. Getting it down on paper the first time is the hardest part.

Facilitator #2: It needs to be documented and shared. You can put it in your handbook, so all members see it.

Participant #1: It is also important to review these goals at the end of the year to see if you've achieved these goals and determine why they have or haven't been met. Then make revisions when necessary.

Facilitator #3: Accountability is important.

Facilitator #2: Member profiling is very important, so we know how to assign members to projects. You should know the backgrounds of your members. How do you have fun so people do what they like to do and do well, how do you keep socially connected? Think about the bigger picture, not just your projects.

Participant #4: Is there a template that you've used for member profiles?

Facilitator #2: Volgistics is an application software that I am familiar with. You can find more information on the Internet.

- The application software I referenced and have used to profile and track Volunteers:
 - [Volunteer Management Software Solutions | Volgistics \(volgistics.com\)](https://www.volgistics.com)
 - [Volunteer Management Software - A New Way to Expand Volunteer Programs \(volunteermatters.com\)](https://www.volunteermatters.com)
- Comparison of volunteer management software:
 - [Best Volunteer Management Software 2021 | Reviews of the Most Popular Tools & Systems \(capterra.com\)](https://www.capterra.com)

Participant #3: We use Club Express, so members fill this out when they join online. It has a member interest section, but we do not have the background part. We have information on each committee, so people know what each group does.

Facilitator #1: If anyone has any surveys that they currently use, please send that to me to share.

Facilitator #3: The Volunteer Council survey might be of interest to all. You may want to look at that and pick out what you want to use.

Participant #5: Be careful that you don't use questions that are illegal. I'd like to see questionnaires from other organizations.

Facilitator #2: Think about a resume for work. Look for skills and customize them for your needs.

Participant #3: If any of you have an outline or other information on new member orientation, please send it to me.

Participant #7: We have a general meeting tomorrow and have around 15 new members. I'll send Participant #3 the one we have.

Participant #3: Can we share directories? I'll send designer house information.

Participant #4: Please send the slides.

Facilitator #1: I'll send an initial email tonight getting permission to share your information. Then I'll send a document with all with permission to share.

Facilitator #3: We do an annual report at the end of each year.

Participant #5: Does anyone keep track of volunteer hours?

Facilitator #2: We do this because it can be used in grant applications. There is also a website that estimates the monetary value of a volunteer hour.

- Grant applications use volunteer time in 2020 averages \$28.54 nationally and a breakout by State at:
 - [The Value of Volunteer Time / State and Historical Data – Independent Sector](#).

General discussion continued for a few minutes.

Facilitator #1: Next week we will talk about communication and technology. If anyone has anything they want to share, please send that to me. Also send me any comments you have on this week's session - what you liked, what you didn't like, etc.

The meeting was adjourned at 4:13 p.m. CDT

Respectfully submitted,
Charlotte Lewis
Strategic Conversations Secretary